NDB | WEALTH

PRIVATE WEALTH MANAGEMENT
A PORTFOLIO OF PRIVILEGES

www.ndbwealth.com

We are NDB Wealth

At NDB Wealth we refer to ourselves as your ‘partner’. Because a partner asks the right questions and listens for the important answers. A parner shares your goals, dreams and the ambition to achieve them. A partner advises and guides providing solutions to problems. A partner takes the time to get to know you and importantly, understand you. A partner provides that warm perspective in life. Yes, we are the experts when it comes to the financial environment, but, being the best partner you can ask for, is our Expertise.

“Our financial advisors strive to become experts in 'YOU' so that we can map out the perfect financial plan to secure your future”

Expert Financial Advice and Planning

Our Partnership services includes:

Goal Identification

- Diagnostic Reviews
- Identification of Issues
- Investment Objectives
- Formulation of Strategy

Communications

- Client Service
- Performance Analysis
- Administering and Reporting

Investment Management

- Asset Allocation
- Portfolio Structure
- Portfolio Management
- Cash Management
- Fixed Income
- Equities

Wealth Advisory Services

- Trust
- Risk Management
- Financial Planning
- Custody of Assets

Dedicated Relationship Manager

Feel at ease with personalised attention and guidance by a Relationship Manager who will take charge of your complete portfolio, with understanding and confidentiality.

Dedicated FUND Manager

Based on your financial goals and your savings or investment preferences, your Fund Manager will allocate your funds into appropriate asset classes, shift funds as and when needed, to reach optimal results.

We keep an eye on everything to do with the economic climate. We research, review, plan, assess and re-assess. We then adjust, discuss and vice versa. We stick to a simple process of genuinely caring and intelligently reacting to changes in the economy ensuring your financial safety and goals are never affected. As a result, we have been entrusted to manage over 100 Billion rupees from over 4,000 clients and these are numbers which continue to grow. If you are looking for someone who can give you the confidence to fearlessly envision a future of financial stability then NDB Wealth Management is the place you can Trust.

"Over 100 Billion rupees from over 4,000 clients"

As a fully owned subsidiary of National Development Bank PLC we can offer you a comprehensive solution in Personal Financial Services. Whether it's Wealth Management or Banking Services we have it all in one place allowing us to provide you with holistic financial services. However unconventional your objectives can get, we are confident that our combination of financial analysts, fund managers and National Development Bank PLC will not only provide just 'a' solution but 'the' solution. Whatever your financial and wealth aspirations may entail we have seamlessly integrated a bank of resources that can offer you more than anyone else can, a perfect Convergence.

> "We can provide you one place for a holistic banking and financial solution"

Enrollment as a Private Wealth Management client.

We are as excited as you are, to embark on this journey of achieving your life goals. Your first step would be to get in touch with one of our Relationship Managers to discuss your possibilities.

Once we have understood your goals and requirements you will then be assisted in the following steps:

- Open an account with NDB Wealth Management
- Decide on the type of account
  - Custody
  - Non-Custody
- Sign a Fund Management Agreement.
- Sign a Power of Attorney
- Complete the Investment Policy Statement

You are now ready to experience the true power of Private Wealth Management.

For an appointment Call

Laknada De Mel on 077 3 443 300 or
Prabu Doraisamy on 077 7 767 505

PrivateWealth Management | NDB Wealth Management

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